



Customer Flow Action Plan

September 2002

The Customer Flow Analysis was conducted by Fraser Consulting L.L.C. The project's Scope of Work outline is included in this Action Plan. The Customer Flow Analysis Report was submitted to the WorkSource management group in August 2002. A number of observations and recommendations forwarded by staff, customers, and the consultant were identified. The report reflects the universe of comments with staff and customers and does not attempt to evaluate the efficacy of, or attempt to prioritize the recommendations. Comments were included as communicated without context, frequency or full assessment of their relevancy.

From the Customer Flow Analysis Report, this Customer Flow Action Plan organizes the recommendations into Baldrige Quality categories, where possible, to assist the Center Use Teams incorporating the improvements into their certification applications. The Action Plan identifies the strategies that will be acted upon, prioritizes them, assigns a responsible party(ies), and projects a completion date. The Action Plan is managed by the WorkSource management group. Each person or team with a task is accountable to the management group for its work on the projected date of completion. The management group is accountable to the One Stop Operator for its completion of the Customer Flow Action Plan.

PRIORITY KEY	
✓	Completed
+	In Process
*	Prioritized for Action
>	For possible later consideration
0	No action planned

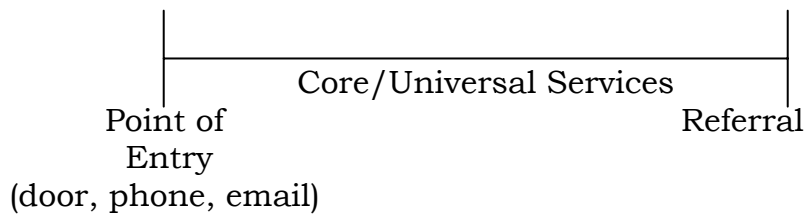
Customer Flow Contract

Scope of Work

June 25, 2002

Phase 1 – Contract Scope

Outline, flow, and document customers who enter the Whatcom WorkSource Center from point of entry to when the customer receives service or a referral.



Outcomes Expected

- ❑ Visual Flowchart of the flow of customers
- ❑ Create a Flowchart of the WTS impact (if available)
- ❑ Executive Summary
- ❑ Documentation of bottlenecks, themes, strengths, opportunities for improvement, and recommendations. Recommendations should be both technical and people centered – and offer ideas for next steps. Wherever possible – include causes and effects.

Data and Resources Needed

- Access to staff, customers (by request and their permission), managers
- May Surveys – reception and resource counter (Kathy and Gary to review and identify themes)
- Comment card data and exit survey data
- Traffic study information
- WorkSource Tracking System (new) Yakima and Tri-County are the initial areas where the new system is being tested and implemented. Seek out data, lessons learned, any flow materials from those centers. (Gary & Dan)

Timeline

- Preference to have information completed before September 1st.
- Design Team meeting on September 12 may need to be rescheduled because of the Public Sector Quality Conference is being held that day. Would be nice to have the flow information available by then.
- The end of September 2002 was suggested as another time in which the work could be accomplished.

Others Who Should Be Contacted

- Willis Daniels
- Summary will be shared with: Center Use Team; Design & Implementation Team; CQI Team

Kinds of Questions to Ask Customers

Wendy will design to ensure full range of steps, satisfaction, and their suggestions for improvement.

Communication Expectations

- Call or email if anything is needed
- Gary Smith and Barbara Korst are contacts for the Center
- Alex/Barbara are contacts for the contract
- Wendy will check messages throughout the day and email every evening
- Expectation that both parties will share concerns and information along the way – there should be no surprises

Customer Flow Action Plan

CUSTOMER & MARKET FOCUS				
<i>Issue</i>	<i>Strategy</i>	<i>Status</i>	<i>Assigned</i>	<i>Completion</i>
Comprehensive Orientation	Develop Tour of Services PowerPoint	+	CUTs/Gary	12/02
	Review orientations delivered currently and modify or redesign for integrated approach	*	CUT	3/03
	Make key PowerPoint slides as handouts	*	CUT	3/03
Enhance Self Service	Build new desktop design	+	CUTs/Paul	10/02
Staffing to Meet Demand Periods	Anticipate high demand staffing needs through use of traffic data and develop variable staffing plan	*	Management group	10/02
	Hire/train dedicated Resource Specialists	+	NWDC/ ESD co-funded	11/02
	Develop protocols for staff backup of Resource Specialists	*	CUT	11/02
	Staff 8am and 12pm hours with additional staff person to achieve full 3 person front end coverage	*	ESD	10/02
	Retain Lobby Technical Assistant internship	+	Gary	1/03
Enhanced referral and access to WorkSource system components	Design & Implement new processes and products to ensure customers have full knowledge and benefit of all WorkSource system partners	*	DAIT CUTs	ongoing
Special Interest Workshops	Older worker classes are available from colleges and possibly from Senior Centers. Explore how best to refer to or host here.	>	CUT	2/03

Customer Flow Action Plan

CUSTOMER & MARKET FOCUS <i>(continued)</i>				
<i>Issue</i>	<i>Strategy</i>	<i>Status</i>	<i>Assigned</i>	<i>Completion</i>
Skill Building Tutorials	Determine methodology to host or refer to skill building opportunities elsewhere	*	CUT & Management group	2/03
Expand Hours/Days of Operation	Benchmark other Centers w/ expanded hours	>	Gary/CUT	
Alternate Language	Identify key printed products already translated into Spanish language versions	*	ESD/Skagit CUT	12/02
Supplies	Diskettes available to customers at Center	✓	Reception	Done

Customer Flow Action Plan

PROCESS MANAGEMENT				
<i>Issue</i>	<i>Strategy</i>	<i>Status</i>	<i>Assigned</i>	<i>Completion</i>
Telephone Answering	Reaffirm w/ staff no Operator Calls answered at Reception	✓	Gary	Done
Customer Triage	Reaffirm w/ Reception staff their <i>initial triage</i> function and then referral to Resource Specialist or other	*	Gary	10/02
	Develop short script to communicate not all services are available at all times	>	Reception Team	
	Examine new opportunities for improvement within WTS implementation to include brief interview/assessment	*	Gary/CUTs	12/02
	Implement Tour of Services for customer self direction	+	CUT	12/02
	Telephone triage process examined	*	CUT	6/03
Job Referral	Reaffirm w/ staff protocols for job referral by scheduled front end coverage staff	+	ESD	9/02
	Explore possibility of Resource Specialists providing job referrals	>	Management group	3/03
Use of "WorkSource"	Review of all staff phone messages, business cards, and print products to ensure consistency with use of WorkSource name	*	Management group	10/02
	Development of marketing protocols for use of WorkSource and agency name/materials	*	Management group	11/02

Customer Flow Action Plan

PROCESS MANAGEMENT <i>(continued)</i>				
<i>Issue</i>	<i>Strategy</i>	<i>Status</i>	<i>Assigned</i>	<i>Completion</i>
Customer Flow from Universal to Intensive Services	Implement Tour of Services	+	CUT	12/02
	Review orientations currently delivered and modify or redesign for more comprehensive, integrated approach	*	CUT	3/03
	Design & Implement new processes and products to ensure customers have full knowledge and benefit of all WorkSource system partners	+	DAIT CUTs Partnership Coordinators	ongoing
	Explore development of "pop up" banners on Lobby PC's with "Did you know . . ." type messages	>	CUT/Dan	
	Explore outreach opportunities using WTS universal customer database	>	CUT	
	Train staff on performance measures and underscore methods to meet system-wide performance. ▪ Win/Win ▪ What counts for performance?	*	DAIT Management group	2/03 & ongoing
Staff Schedules	Determine method for all admin & service staff in building to provide Reception with their current schedules. Implement and train.	+	Gay/NWDC	10/02

Customer Flow Action Plan

PROCESS MANAGEMENT <i>(continued)</i>				
<i>Issue</i>	<i>Strategy</i>	<i>Status</i>	<i>Assigned</i>	<i>Completion</i>
Appointment Announcements	Examine improvements to notification process to staff when customers arrive for appointments	*	CUT	10/02
Warning System	Develop protocols for responding to Reception "panic alarm"	✓	Safety Committee	11/02
UI Service Tracking	Influence state decision to discontinue asking for name of customer	✓ <i>unsuccessful</i>	Barbara/Pete/Tammy	10/02

Customer Flow Action Plan

HUMAN RESOURCE DEVELOPMENT & MANAGEMENT				
<i>Issue</i>	<i>Strategy</i>	<i>Status</i>	<i>Assigned</i>	<i>Completion</i>
Communication	Expectation of attendance at All Staff meetings underscored	*	Gay/Barbara	9/02
Resource Specialist	Targeted, competency based training to ensure consistent quality and service levels	*	Center Managers, Regional Training Team & CUTs	Ongoing
Staff Cross Training	Continue staff presentations at All Staff meetings	+	Gary w/ supervisors	Ongoing
	Continue Partner open house training format	+	Regional Training Team	Ongoing
	Develop guide (cheat sheet) to Center functions	>	CUT	
Reception Training & Communication	Add Receptionist to Center Use Team	*	WDC	9/02
	Train reception staff to handle inquiries to all partner related <i>basic</i> questions. (FAQ's)	*	Gary/ Reception Group/ CUT's	Ongoing
	Convene regular scheduled Reception Staff meetings	*	Gary	11/02 & ongoing
	Develop Reception process orientation guide to achieve consistency	>	Gary w/ Reception Staff	1/03

Customer Flow Action Plan

INFORMATION & ANALYSIS				
<i>Issue</i>	<i>Strategy</i>	<i>Status</i>	<i>Assigned</i>	<i>Completion</i>
Customer Tracking	Design local customer flow for WorkSource Tracking System implementation	+	Gary w/ CUT's	11/02
	Develop statewide report enhancements for WTS	*	Gary	01/03 ongoing
	Implement WTS	+	Gary/Kathy/Dan	12/02

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FACILITY				
<i>Issue</i>	<i>Strategy</i>	<i>Status</i>	<i>Assigned</i>	<i>Completion</i>
Reception Desk ergonomics	Shorten width of desk, design for WTS member card printing	+	Dan/Gary	12/2002
Reception filing	Evaluate materials filed/used; incorporate new storage as needed	>	Gary	
Parking	Maps to parking areas incorporated into information sheets	✓	Gary	done
Drinking Fountain	Identify where/how/ & cost to install a drinking fountain	>	Dan	10/02

TECHNOLOGY				
<i>Issue</i>	<i>Strategy</i>	<i>Status</i>	<i>Assigned</i>	<i>Completion</i>
Lobby Capacity	Add more PC's to resource lobby	+	Dan/Paul	1/03
	Add additional customer telephone	✓	Dan/Paul	done
Log In Enhancements	Implement WorkSource Tracking System w/ common protocols	+	Gary/Dan/CUTs	12/02
Enhance Self Service	Build new desktop design	+	CUTs/Paul	10/02
Warning System	Install "panic button" at Reception desk	*	Dan	12/02

Customer Flow Action Plan

BUSINESS SERVICES				
<i>Issue</i>	<i>Strategy</i>	<i>Status</i>	<i>Assigned</i>	<i>Completion</i>
Develop comprehensive business services model	Continue building sectoral approach to industries and occupational clusters	+	NWDC & NW Partnership for Workforce Development	Ongoing
	Add Industry Sector section to Inside WorkSource Northwest	>	Gary/Rhonda	
	Host sectoral focused business forums	*	NWDC & NW Partnership	2003
	Convene Partnership business outreach staff as ongoing Process Improvement Team	>	DAIT/ NW Partnership	2 nd quarter 2003
Marketing	Continue participation with state marketing team to develop business outreach product and strategy	+	Gary	Ongoing
	Develop high quality "leave behind" collateral material for local outreach	>	NWDC	
	Develop WorkSource "speaker kit" to highlight key messages to business audiences	>	NWDC	
	Develop protocols for joint advertising with colleges and businesses placing recruiting newspaper advertisements	*	Leadership (CTCs) & Sharry	1/03